

## MONTHLY REPORTS

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### Program Specific Deliverables for Third Party Programs

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Implementers shall provide the data listed under the categories that apply to their programs (e.g. Direct Installation Programs, Marketing) in their monthly reports as supporting documentation along with their monthly invoices.

**Direct Installation Programs** (Programs where Implementer provides energy efficiency measures, including maintenance, repair, or optimization services at no charge to the Customer)

For each Customer site where an energy efficiency measure is installed, Implementer shall submit the following deliverables on a monthly basis:

- Customer's name
- Customer's service address
- Customer's account number(s)
- Whether customer is owner or renter
- Energy efficiency measures installed
- Quantity of each energy efficiency measure installed
- Date of installation
- Estimated energy and demand savings
- Customer details related to specific program goals (as applicable)
  - Customer's language preference – *if proposal targets non-English speakers*
  - Structural category such as age and type of building – *if proposal specifies certain types of building to be targeted*
  - Customer size, such as Small or Very Small businesses – *if proposal specifies size of Customer to be targeted*
  - Whether Customer falls into moderate income level (income level less than 400% of federal poverty guidelines) – *if proposal specifies income target*
  - Housing Type - Mobile home – *if proposal targets Multi-Family and Mobile Home Tenants*
  - Whether Customer is located in areas other than the San Francisco Bay Area, San Diego area, Los Angeles Basin or Sacramento – *if proposal targets rural customers*
  - If Customer is a business with less than ten employees – *if proposal targets small businesses*
  - If Customer is a Small (annual electric demand is between 20 kW and 100 kW, or whose annual gas consumption is between 10,000 therms and 50,000 therms, or both) or Very Small (annual electric demand is less than 20 kW, or whose annual gas consumption is less than 10,000 therms, or both) non-residential customer– *if proposal targets small businesses*
  - If Customer is a business in a leased space – *if proposal targets businesses in leased spaces*
  - *Any other Customer characteristics that proposal specifically targets*

**Rebate, Loan, or other Financial Assistance Programs** (Programs where Implementer provides rebate, loan, co-funding, or other financial assistance for the installation of energy efficiency measures, including maintenance, repair, or optimization services)

1. For each rebate payment made, Implementer shall submit:

- Customer's name
- Customer's service address
- Customer's account number(s)
- Energy efficiency measures installed
- Quantity of each energy efficiency measure installed
- Demand and energy savings as applicable (kW, kWh, therm)
- Amount of rebates paid
- Date of payment
- Customer details related to specific program goals (as applicable)
  - Customer's language preference – *if proposal targets non-English speakers*
  - Structural category such as age and type of building – *if proposal specifies certain types of building to be targeted*
  - Customer size, such as Small or Very Small businesses – *if proposal specifies size of Customer to be targeted*
  - Whether Customer falls into moderate income level (income level less than 400% of federal poverty guidelines) – *if proposal specifies income target*
  - Housing Type - Mobile home – *if proposal targets Multi-Family and Mobile Home Tenants*
  - Whether Customer is located in areas other than the San Francisco Bay Area, San Diego area, Los Angeles Basin or Sacramento – *if proposal targets rural customers*
  - If Customer is a business with less than ten employees – *if proposal targets small businesses*
  - If Customer is a Small (annual electric demand is between 20 kW and 100 kW, or whose annual gas consumption is between 10,000 therms and 50,000 therms, or both) or Very Small (annual electric demand is less than 20 kW, or whose annual gas consumption is less than 10,000 therms, or both) non-residential customer– *if proposal targets small businesses*
  - If Customer is a business in a leased space – *if proposal targets businesses in leased spaces*
  - *Any other Customer characteristics that proposal specifically targets*

2. For each rebate application received by Implementer and not yet paid by the end of the reporting period, Implementer shall provide the following data:

- Number of applications received
- Estimate of amount of incentives to be paid
- Estimates of demand and energy savings as applicable (kW, kWh, therm)

**External Training (this does not apply to employee training)**

For each training session completed, Implementer shall submit the following deliverables:

- Date and length of training
- Location of training
- List of attendees and/or organizations represented
- List of training materials used
- Pre- and Post- test results (as applicable per program design)

**Marketing – If marketing is the primary program activity, otherwise report on a quarterly basis**

1. For each marketing material developed, Implementer shall submit the following deliverables developed during each reporting period:

- Copy of marketing materials, including but not limited to flyers, brochures, posters, Program announcements, newsletters, website posting, point-of-purchase materials, etc.
- Quantity produced
- Method(s) of distribution and quantities distributed for each method

2. If Implementer is targeting a non-English-speaking customer segment, Implementer shall develop marketing materials in the targeted customer's native language and submit a copy to the IOU Agreement Representative.

**Audits/Site Surveys**

For each audit/site survey conducted, Implementer shall submit the following deliverables:

- Customer signed site access agreement
- Customer's name
- Customer's service address
- Customer's account number(s)
- Energy-using equipment and features analyzed
- Energy efficiency measures recommended
- Estimated demand and energy savings potential
- If Implementer is claiming savings for audit, a signed customer agreement to install or implement the recommended energy efficiency measures, or report describing Implementer's follow-up to verify that customer has taken action